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AUTHOR Saville, Anthony; Hill, Jonathan
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ABSTRACT

By providing more accurate and complete data, a personal exit interview is superior to an exit questionnaire; however, separation interviews in the field of education are not common. To optimize the benefits of an exit interview for both the district and the departing employee, a formal, oral interview should be scheduled within the last 4 weeks of employment. Key areas to cover in this meeting include (1) the reason for separation; (2) the positive aspects of the job; (3) the employees' feelings about their supervision; (4) adequacy of salary, benefits, and working conditions; (5) employee complaints or suggestions; (6) the possible existence of unresolved problems; and (7) separation formalities/information. Based on an analysis of exit literature and interview instruments, this document provides a generic model for a separation program that includes a list of items for inclusion in an exit interview. (KM)

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THE EXIT INTERVIEW:

A GENERIC MODEL

by

Anthony Saville
Professor of Educational Administration
and Higher Education
University of Nevada, Las Vegas
Las Vegas, NV 89154

and

Jonathan Hill
Principal, Rural Secondary Special Education
Programs
San Bernardino County Schools

U.S. DEPARTMENT OF EDUCATION
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THE EXIT INTERVIEW: A GENERIC MODEL

Separation, in professional jargon, is a general term referring to the ending of an employer-employee relationship. It primarily includes retirements, resignations, dismissals and may involve promotions and transfers. From a psychological point of view all separations involve some degree of trauma. When one considers the amount of time an employee spends on a job and the fact that humans tend to resist major changes in lifetime routines, separations create very trying situations for a majority of people. Consequently, it behooves the educational institutions to consider both the humane aspect as well as the more practical features of employee separation.

Any turnover among staff, regardless of the nature of the separation, generates costs associated with recruitment, selection, and induction of new employees. There also may be concurrent slippage in services or performance as remaining workers adjust to change and the new staff member develops on-the-job experience. The positive aspect of turnover is that it permits organizations to improve upon the quality of personnel through replacement. This is not to cast negative aspersions upon the "separatee" but the assumption is that every vacancy should create an opportunity to add quality to the staff.

Experienced employees have considerable expertise they take with them. It is only prudent to debrief departing employees to learn about their special skills and contributions, and their observations of the district's strong and weak points. Even in the case of employees being dismissed, their views of the system may identify weak points. Further, it may be possible to determine factors which contributed to their unsatisfactory performance so that future employee selections are better.

School district policies generally identify steps and requirements for legally acceptable resignations and retirements. When an employee begins these processes, s/he is psychologically beginning the separation transition. In the case of retirement, counseling relating to benefits is often part of current practice. In the case of a dismissal, state laws spell out a sequential process which the district must follow. The psychological adjustment to separation begins with the first step of this procedure.

In many cases the unit manager or prime evaluator for each separating employee discusses their leaving, at least informally. Information may be gathered which does, in fact, provide bases for changing procedures within the work unit. This informal system has several weaknesses, however, in that it is not consistent for all employees; it may overlook persons in lower-paying positions; it may not be very accurate (due to loyalties or fears relating to the supervisor); and it seldom captures any data which is returned to the central office.

Based upon our search for data we found that exit interviews in the field of education are not common. Of the two formats used, personal interview and questionnaire, the interview is significantly more effective. It provides a face-to-face contact between the district representative and the separating employee and subsequently provides more accurate and complete data.

The negatives of the personal interview in large school districts are cost and time. For example, the Clark County School District (Nevada) had 326 staff separations in 1987. If they had utilized a 30-minute personal interview format, this would have required a minimum of 163 hours of staff time, not including additional time and cost for paperwork.

Questionnaires require less time but they are much less able to generate usable data. The Los Angeles City Unified School District reported field testing a questionnaire with several hundred retiring teachers--only seven responded. Kenosha Unified School District No. 1(Wisconsin) also had a similar experience.

A retirement counseling program to assist employees in making the transition to retired life is also very important. The primary focus should be to review various pension options (if available), to study the traumatic effects of a lifestyle change and how to search for new activities and routines. Great care should be taken by the district not to provide financial counseling because of legal liabilities.

Information gleaned from veteran retiring staff should be of significant value to any organization. As a consequence we recommend that a formal, oral interview be scheduled within the last four weeks of employment. It should be conducted by an "approachable" person specifically charged with this duty. Perhaps a retired individual working part time or on substitute teacher's pay would be an effective interviewer. Garrison and Ferguson encourage that ten key components be included in the interview process.[1]

1. Reason for Separation. The first piece of information is why the employee is leaving together with precipitating factors. Even in the case of dismissal, it may be useful to gather this information. The employee's perceptions may be quite different if this environment is considered safe from retribution. In the event of a wrongful dismissal, it may be stopped.
2. Positive Aspects of the Job. Each employee identifies some aspects of the job which s/he liked. The interviewer follows

up by asking particular contributions of which the individual is most proud.

3. Supervision. Questions about how you got along with the boss may uncover some real sensitivities. Importantly, it may identify areas of management training needed throughout the system.
4. Salary, Benefits, and Working Conditions. Probably everyone can spend more than they make; nonetheless, this question may expose some hidden inequities or important factors affecting job satisfaction.
5. Career Development. Review the district's inservice programs, promotions, reclassifications, or other recent career training which has been especially worthwhile/worthless. Frequent negative responses here may be tied to areas with a high rate of turnover.
6. Complaints. Every position is going to include some complaints or areas of dissatisfaction. They need to be analyzed and corrected if significant.
7. Suggestions. Once items are on the table, the employee may be able to identify possible solutions.
8. Unresolved Problems. It is beneficial to clear any outstanding problems or disputes.
9. Additional Comments. The formal interview needs to open the door to any further information the separating employee has to offer. S/he may have a comment they would like to make which

may be very helpful to the district. It may have been stimulated by earlier questions or be in an area not previously addressed.

10. Information to the Employee. Depending on the nature of the separation, it is important to inform the individual on retirement, rehire, final paycheck, property check, substitute, insurance coverage, or emeritus policies.

An eleventh item which would be suitable in the case of an employee who is leaving for a more attractive position or is taking early retirement would identify characteristics of the new position or change that made it more appealing. While many factors such as location or spouse's transfer are beyond the control of the district, other factors such as salary or scope of duties are (to some degree) within the range of district authority.

From a district's perspective the exit interview provides several worthwhile outcomes. Among them are:

1. Assist in monitoring overall effectiveness of the district operation utilizing an "insider's" point of view. While a few may be concerned about future recommendations or possible re-employment in the future, there are generally few obstacles to a specific, honest appraisal of program effectiveness and job satisfaction.
2. Identifying particular situations needing immediate attention. From time to time interviewees may reveal a serious problem in a given situation which must be corrected by quick action.
3. Gathering in-depth information on personnel practices. Exit interviews will provide hard data on various factors relating to job satisfaction.

4. Give the employee, particularly those leaving after a long period of service, a personal contact from the district. A personal "thank you and best wishes" is important.

From the employee's perspective there are also worthwhile outcomes.

1. Share your expertise with the district. Effective management would be wise to listen to you.
2. Develop a sense that you are leaving some kind of legacy. Especially in a large system, individuals frequently feel like one tiny marble in a large bag. At separation one marble is removed and another is found and put in its place. You should want to feel that your contributions have been significant and will be remembered in some form years later, yet recognizing that the system must move on. You helped it reach the level it has.

We suggest that a pilot interview study be conducted to cover a period of one year to determine the value of the exit interview in your district.

Some questions that might assist in evaluating the project follow.

1. How did the respondents rate the overall effectiveness of each of the district operations identified in the instrument?
2. Were any situations identified which required immediate attention?
3. Do the results of the exit interview process suggest any modifications to district personnel policies and practices?
4. What were the feelings retirees had toward the exit interview process?
5. Should the process be continued with certificated retirees?

6. Should the process be used to address other personnel groups? Perhaps study of retiring classified employees, terminated employees, or selected categories of resigning employees would net valuable data.

Based on an analysis of the literature and the few interview instruments we could locate, a generic model of items to be included in an exit interview instrument has been developed and included in the following pages.

Generic Model

EXIT INTERVIEW SUMMARY
Anthony Saville
Jonathan Hill

This form is to be completed by the district exit interviewer based on the interviewee's responses to the general questions printed in bold face type.

1. **Tell me about your personal history in education and with the School District.**

classified
years with the district

certificated
years in education

elementary
administration
cafeteria

junior high
custodial
maintenance

high school
paraprofession
transportation

other
clerical

BA BA+ MA MA+ PhD

Comments

2. **Why are you leaving us?**

resignation
other employment
new position out of area
spouse transferred
family responsibilities
leaving area
marriage
medical
personal
failed to certify
leaving education

leave
necessity
medical
professional
personal

Comments

retirement
others, specify

3. **What particular aspects of the job did you like?**
(Interviewer: Mark any characteristics the interviewee reports.)

school goals and objectives
school rules, policies
school-community relations
parent-teacher conferences
grades, report cards
student needs, interests
student values, attitudes
instructional objectives
extraccuricular activities
staff meetings
inservice programs
PTA meetings
school assemblies
field trips
school clubs, student council
secretaries, custodians
paraprofessionals

curriculum, specify subject
substitute teachers
vocational education
guidance services
instructional materials
employee evaluation
site administration
central office administration
student attendance
student-teacher relations
discipline
libraries, media centers
study hall
school plant, facilities
audio-visual materials
others, specify

Comments

4. **What aspects of your work did you like the least?**
(Interviewer: Mark any characteristics the interviewee reports.)

school goals and objectives
school rules, policies
school-community relations
parent-teacher conferences
grades, report cards
student needs, interests
student values, attitudes
instructional objectives
extraccuricular activities
staff meetings
inservice programs
PTA meetings
school assemblies
field trips
school clubs, student council
secretaries, custodians
paraprofessionals

curriculum, specify subject
substitute teachers
vocational education
guidance services
instructional materials
employee evaluation
site administration
central office administration
student attendance
student-teacher relations
discipline
libraries, media centers
study hall
school plant, facilities
audio-visual materials
others, specify

Comments

5. **What suggestions do you have to improve our schools/school system?**
(Interviewer: Mark any characteristics the interviewee reports.)

school goals and objectives
school rules, policies
school-community relations
parent-teacher conferences
grades, report cards
student needs, interests
student values, attitudes
instructional objectives
extraccuricular activities
staff meetings
inservice programs
PTA meetings
school assemblies
field trips
school clubs, student council
secretaries, custodians
paraprofessionals

curriculum, specify subject
substitute teachers
vocational education
guidance services
instructional materials
employee evaluation
site administration
central office administration
student attendance
student-teacher relations
discipline
libraries, media centers
study hall
school plant, facilities
audio-visual materials
others, specify

Comments

6. **Have you accepted a new position?** YES NO

7. **Is it in the field of education?** YES NO

8. **What particular aspects of the job appealed to you?**
(Interviewer: Mark any characteristics the interviewee reports.)

implicit job satisfaction	salary	benefits
career advancement	location	supervision
working conditions		

Comments

9. **Which of YOUR contributions to the district brings you the greatest pride?**

Comments

10. **How would you describe the quality of supervision you received from your principal/evalutor?**

Comments

11. **How would you describe the benefit package available to you as an employee of the district?**
(Interviewer: Mark any characteristics the interviewee reports.)

(life)	(health)	(dental) (vision)	(retirement)
spouse coverage		family coverage	(others, specify)

Comments

12. **How would you evaluate the opportunities for career development?**
(Interviewer: Mark any characteristics the interviewee reports.)

recruitment	promotions	reclassification	transfers
inservice	assignment	induction	others, specify
selection			

Comments

13. **Are there any unresolved problems or concerns that you would like to have resolved before you leave?**

Comments

14. **Do you have any additional thoughts or comments?**

Comments

15. **Is there any information the district or (retirement system) could provide you at this point in time?**

Comments

Interviewer: Describe the interviewee's attitude during this interview.

pleased, anxious to offer ideas	pleasant, straightforward
quiet, reluctant	angry, sullen
refused to attend	others, explain

[1]Garrison, Laura and Jacqueline Ferguson. "Separation Interviews," Personnel Journal. September 1977. Pp. 438-442.

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